ACCOUNT-BASED INFORMATION CONTROL AND EXCHANGE UTILITY

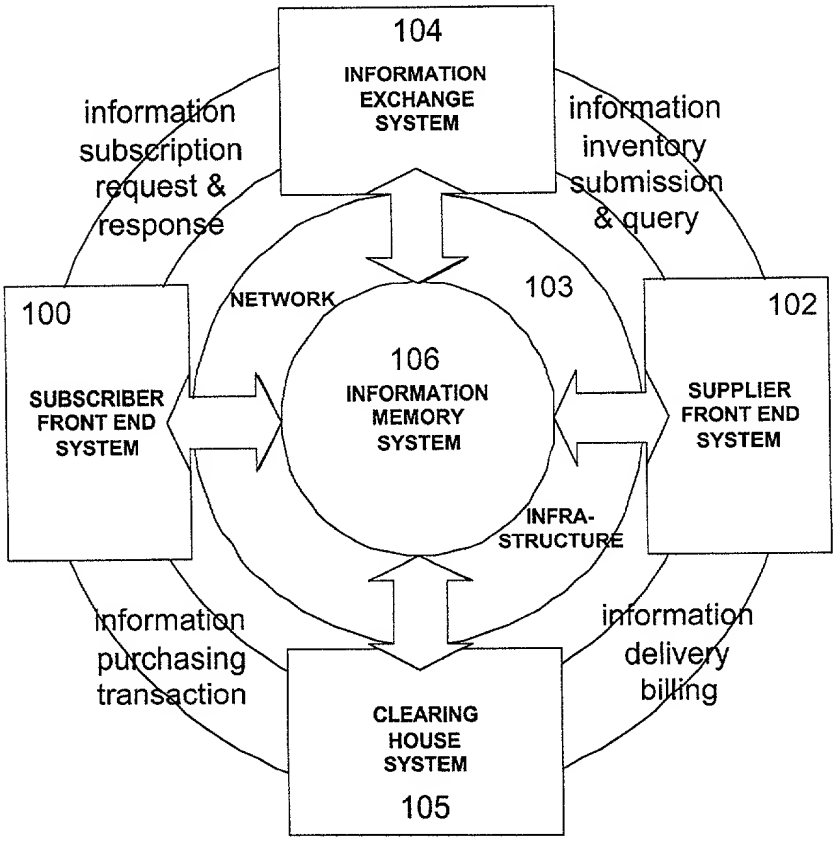

Figure 1

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Docket No. 95002.3

ACCOUNT-BASED ON REQUEST INFORMATION CONTROL AND EXCHANGE UTILITY

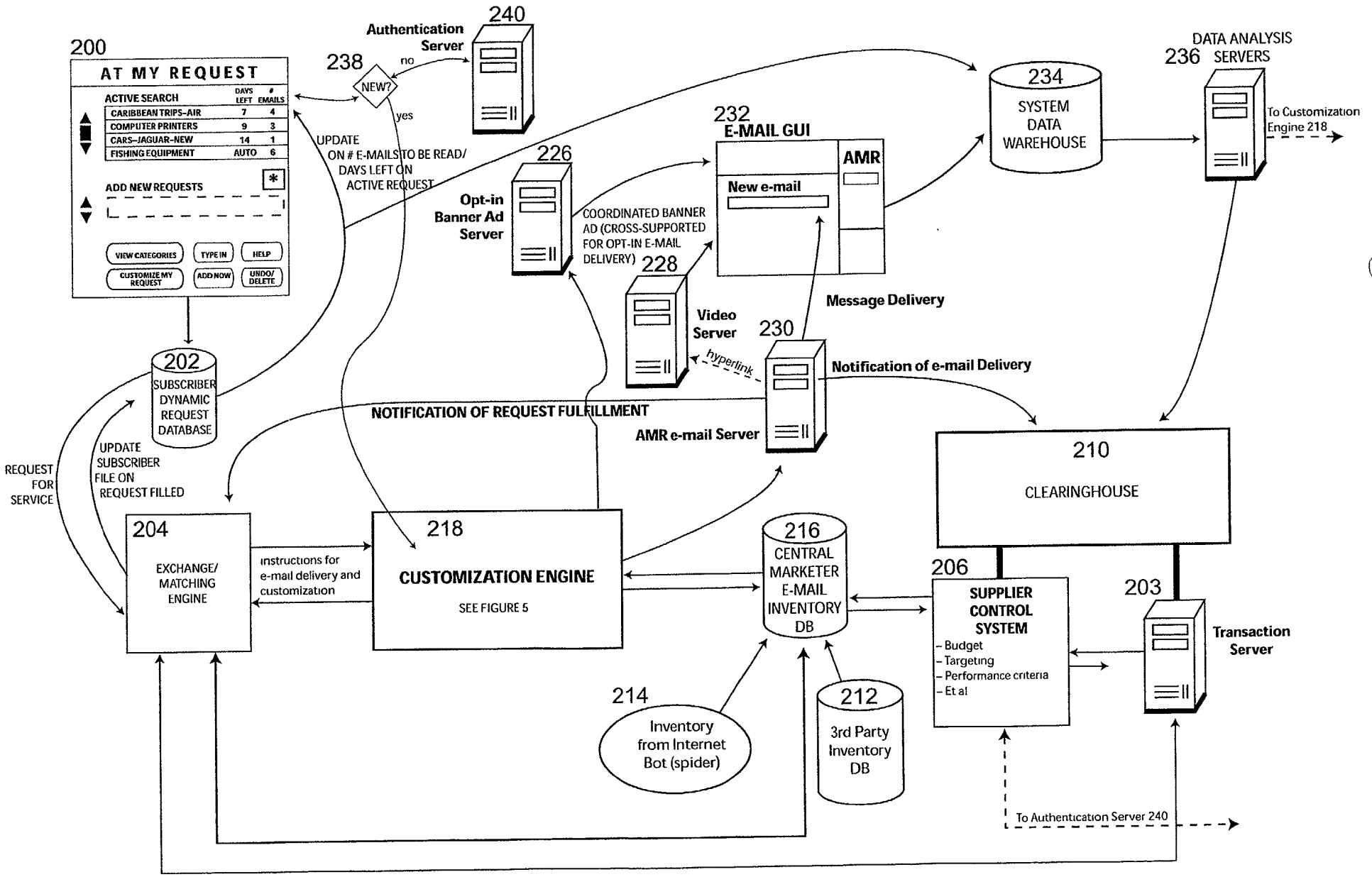

Figure 2

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SYSTEM ARCHITECTURE FOR THE PRESENT INVENTION

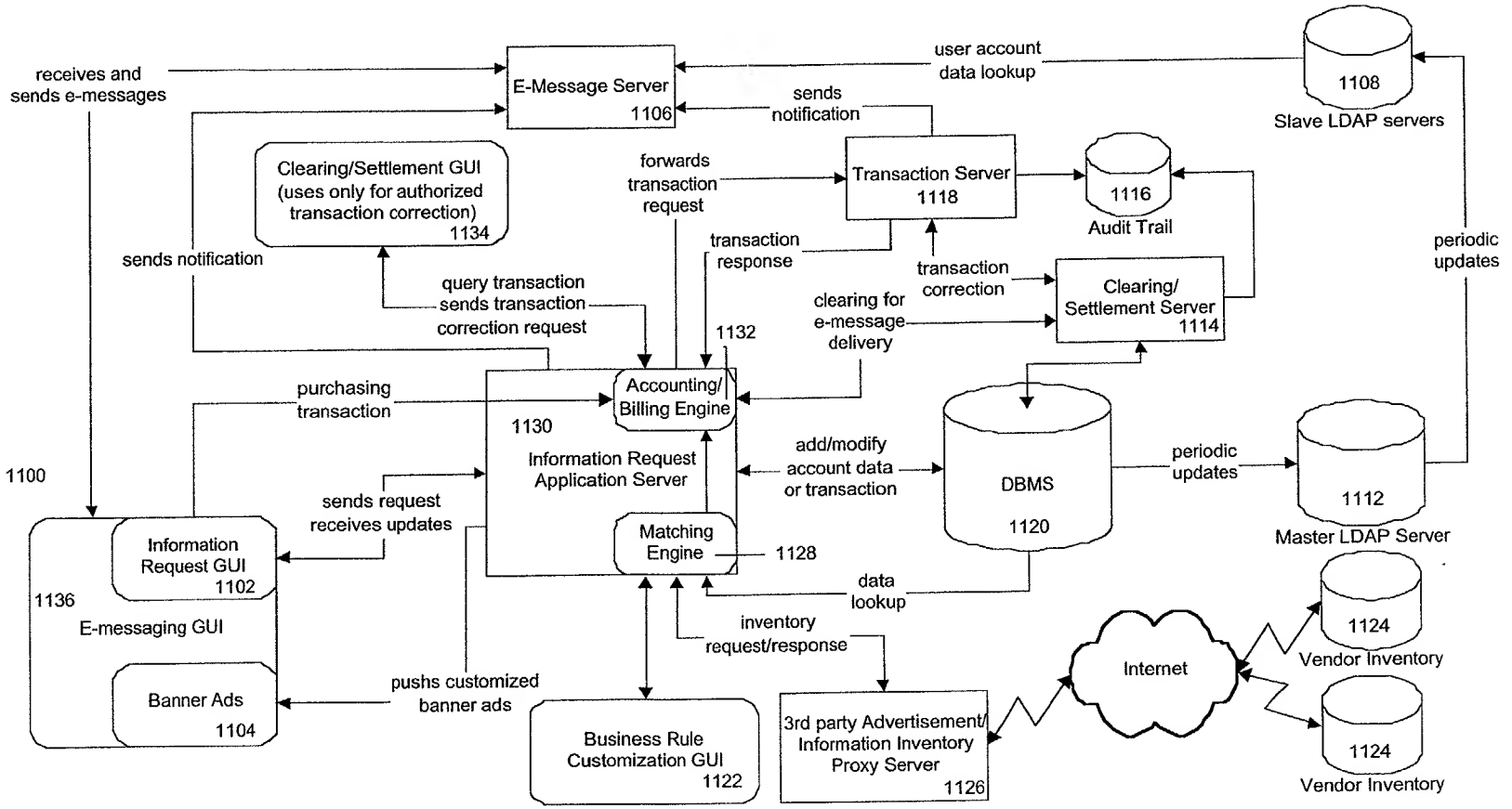

Figure 3

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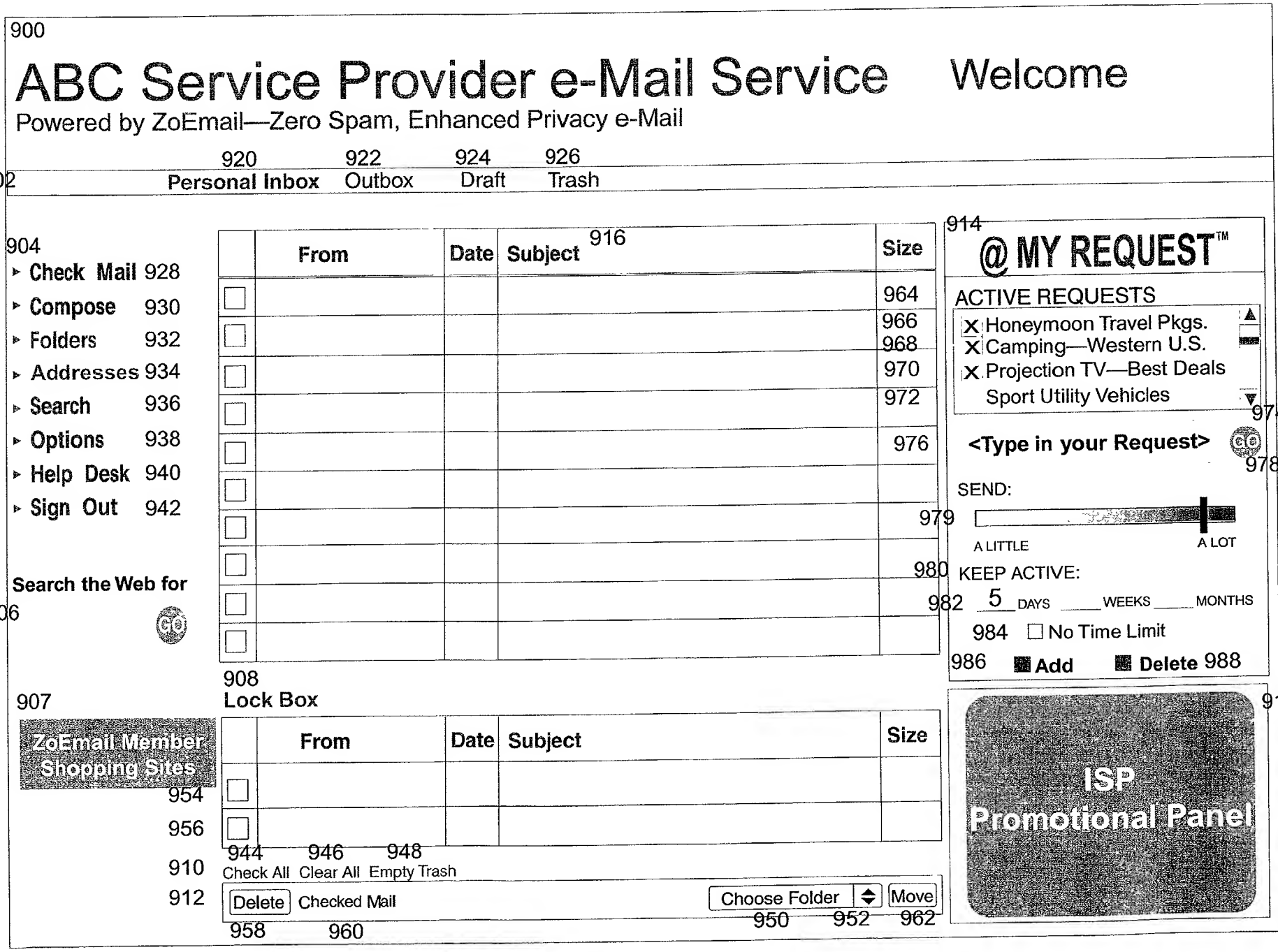
900
ABC Service Provider e-Mail Service
Welcome
Powered by ZoEmail—Zero Spam, Enhanced Privacy e-Mail
920 Personal Inbox
922 Outbox
924 Draft
926 Trash
902
904
Check Mail 928
Compose 930
Folders 932
Addresses 934
Search 936
Options 938
Help Desk 940
Sign Out 942
Search the Web for
906
GO
From
Date
Subject
916
Size
964
966
968
970
972
976
979
980
908
Lock Box
907
ZoEmail Member Shopping Sites
954
956
910
912
944 Check All
946 Clear All
948 Empty Trash
Delete
Checked Mail
958
960
Choose Folder
Move
950
952
962
914
@MY REQUEST™
ACTIVE REQUESTS
X Honeymoon Travel Pkgs.
X Camping—Western U.S.
X Projection TV—Best Deals
Sport Utility Vehicles
974
<Type in your Request>
978
SEND:
A LITTLE
A LOT
KEEP ACTIVE:
982
5 DAYS
WEEKS
MONTHS
984
No Time Limit
986
Add
Delete
988
918
ISP Promotional Panel

Figure 4

"AT MY REQUEST"—DYNAMIC ON REQUEST SELECTION ENGINE™: USER-CUSTOI ON SCREEN PERSONAL INFORMATION CONTROL DASHBOARD

800
ALTERNATIVE USER ACCESS

e-mail interface 810 | At My Request 812
Web-based eMail 808

ISP Mail 816 | AMR 818
ISP-based eMail with Modular AMR 814

Address | AMR
819
Browser Plug-in/Pull-down 821

At My Request Web Site 822
Web site for AMR 820

AMR 826
Desktop Application (or Agent) or Thin Client 824

a) Hyperlink
b) Java Applet

802
ON SCREEN AMR FUNCTION

(ON SCREEN)

830 **AT MY REQUEST™**

834 ACTIVE SEARCH	DAYS LEFT	# EMAILS	
CARIBBEAN TRIPS–AIR	7	4	836
COMPUTER PRINTERS	9	3	838
CARS–JAGUAR–NEW	14	1	840
FISHING EQUIPMENT	AUTO	6	842

832

873 M [*] 872

844 **ADD NEW REQUESTS**

846

862 864

860 VIEW CATEGORIES | TYPE IN | HELP

868

866 CUSTOMIZE MY REQUEST | ADD NOW | UNDO/ DELETE

870

867 CC: SHARE INFO | DELIVERY DEVICE | LOCAL INFO

871

869

- Can highlight active requests and see what the custom criteria are that have been set.
- [*] Flashing means new messages from service.
- CC: SHARE INFO is sent as a forward to friends/family from the AMR user so it doesn't have the apperance of spam. (An opt-out functionality is provided for such recipients.)
- [M] is a button that automatically sets forwarding of the emails to go to a Mobile device (in addition to the desktop default.)
- Local Info button opens new window in which user can designate geographic specifications from which information is desired.

Summary Prepared 7/30/00 of 3 months prior work (J. Tucciarone)

Figure 5a

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IIZABLE INFORMATION CONTROL & EXCHANGE UTILITY

804

AMR POP UP FOR REQUEST CUSTOMIZATION

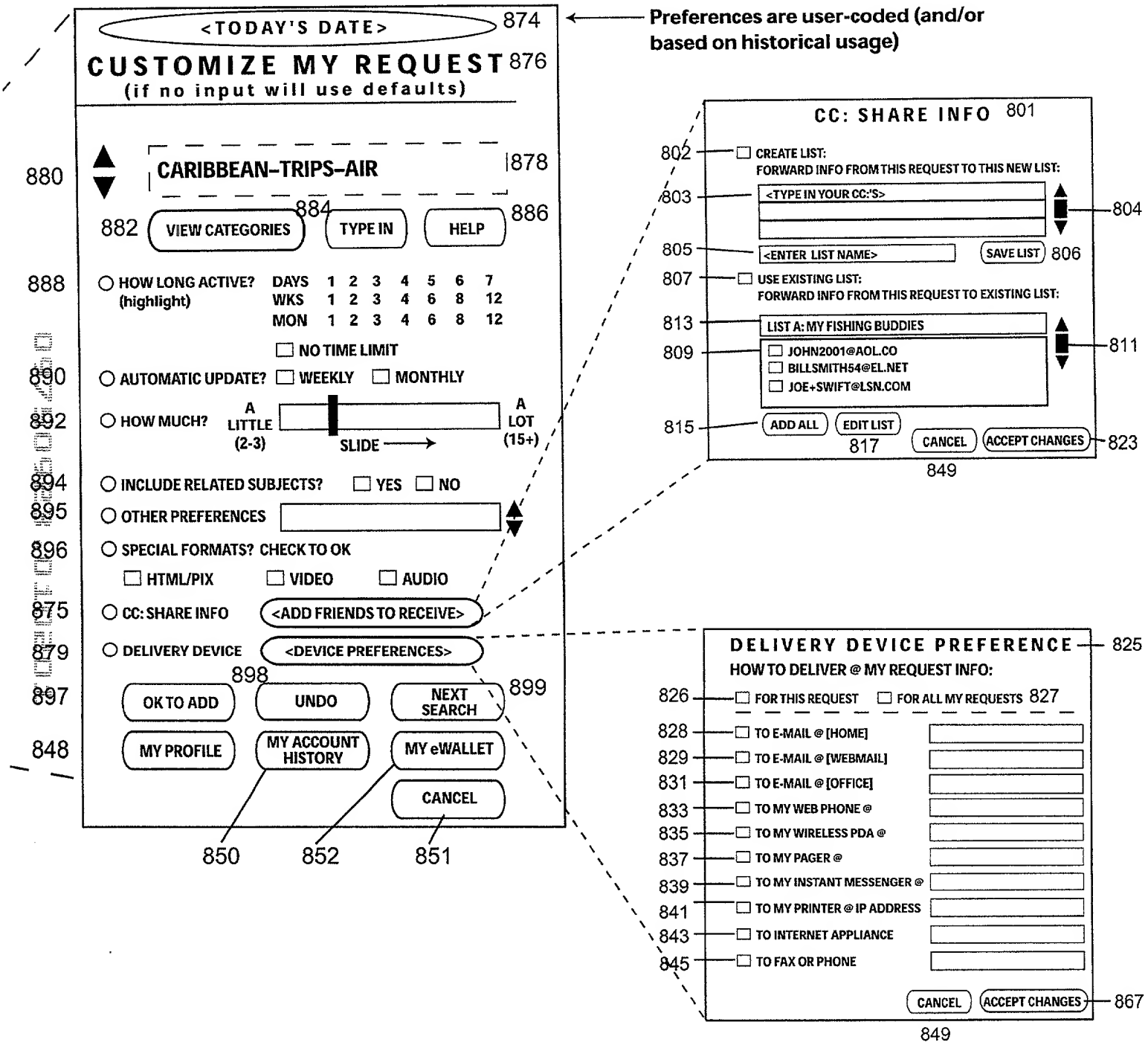

Figure 5b

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"AT MY REQUEST"—GEOGRAPHIC REQUEST SPECIFICATION PANEL

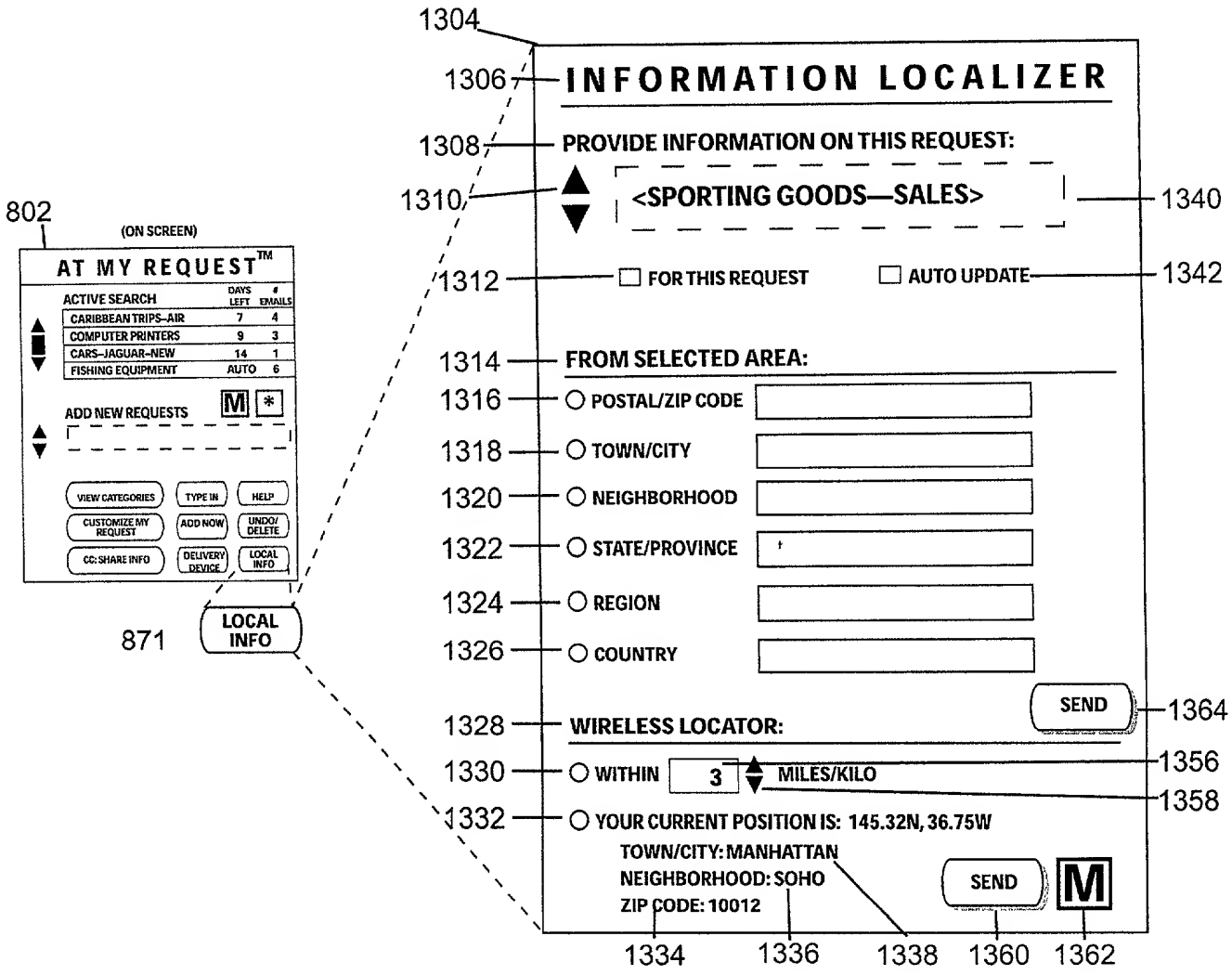

Figure 6

© 2000 ZOECORP

"AT MY REQUEST"—DETAIL OF CUSTOMIZATION ENGINE

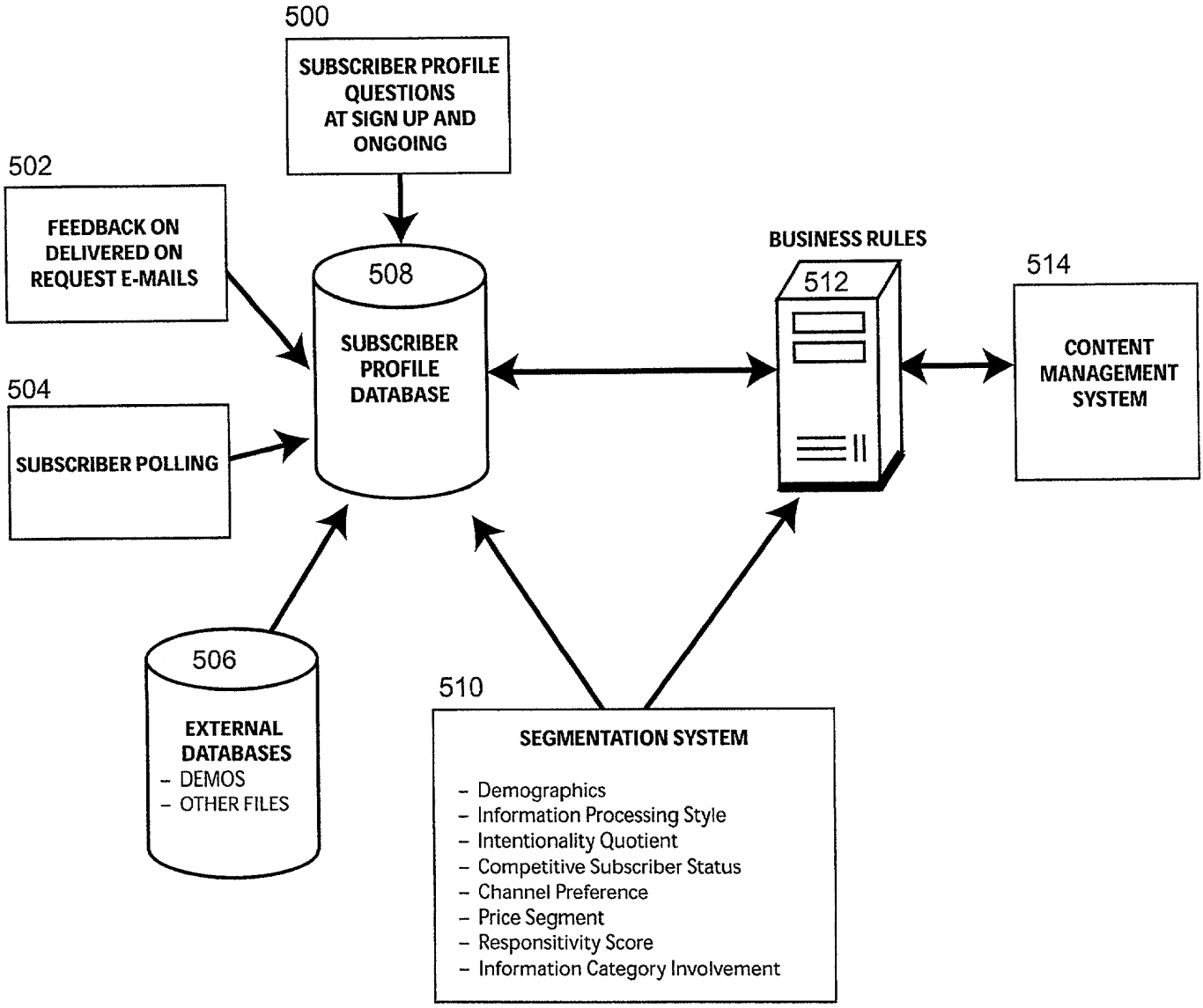

Figure 7

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"AT MY REQUEST"—REPRESENTATION OF CENTRAL POSTING SYSTEM OF ACTI

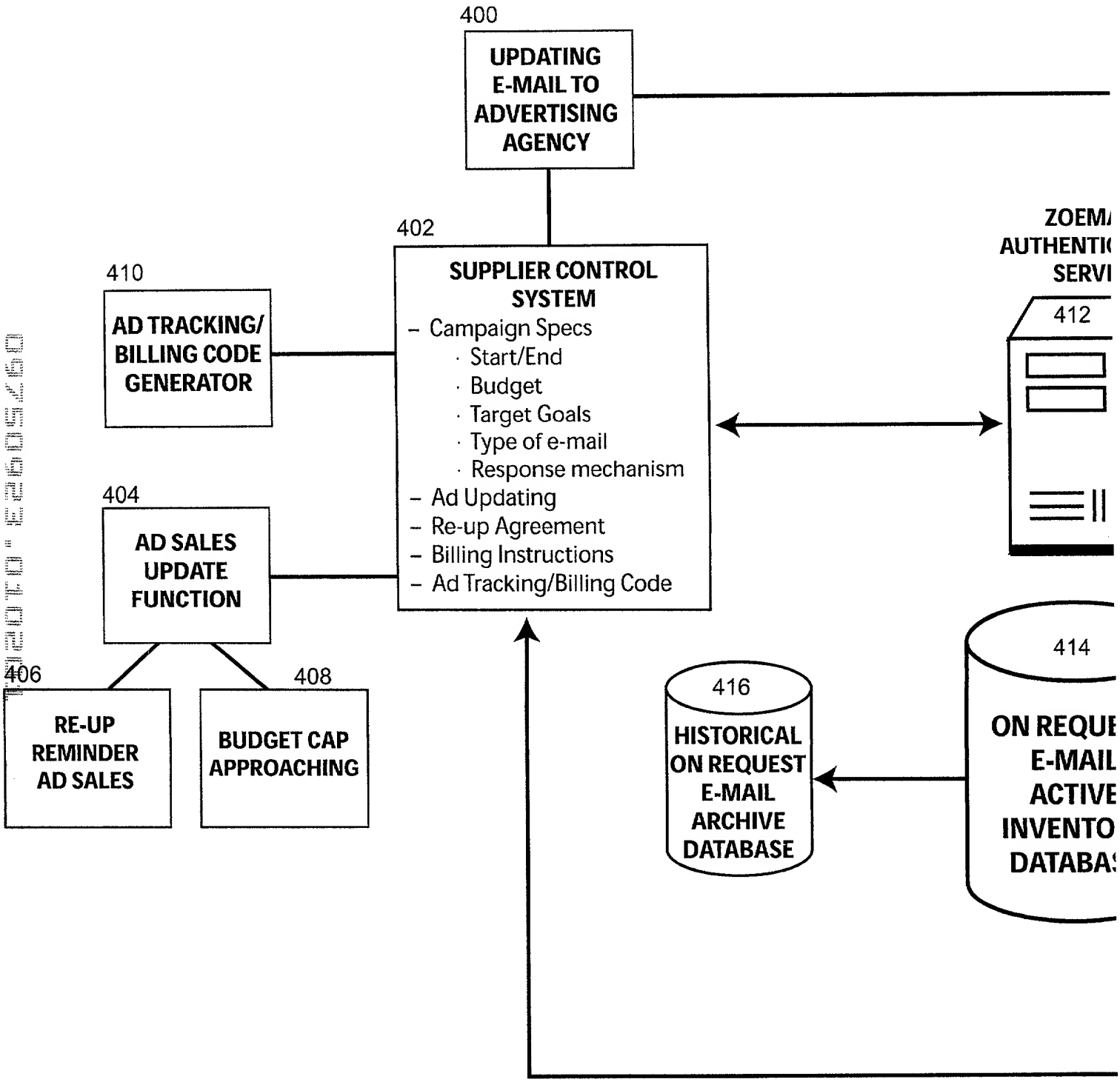

Figure 8a

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E E-MAIL INVENTORY—WITH TWO ALTERNATIVE MEANS OF UPDATING

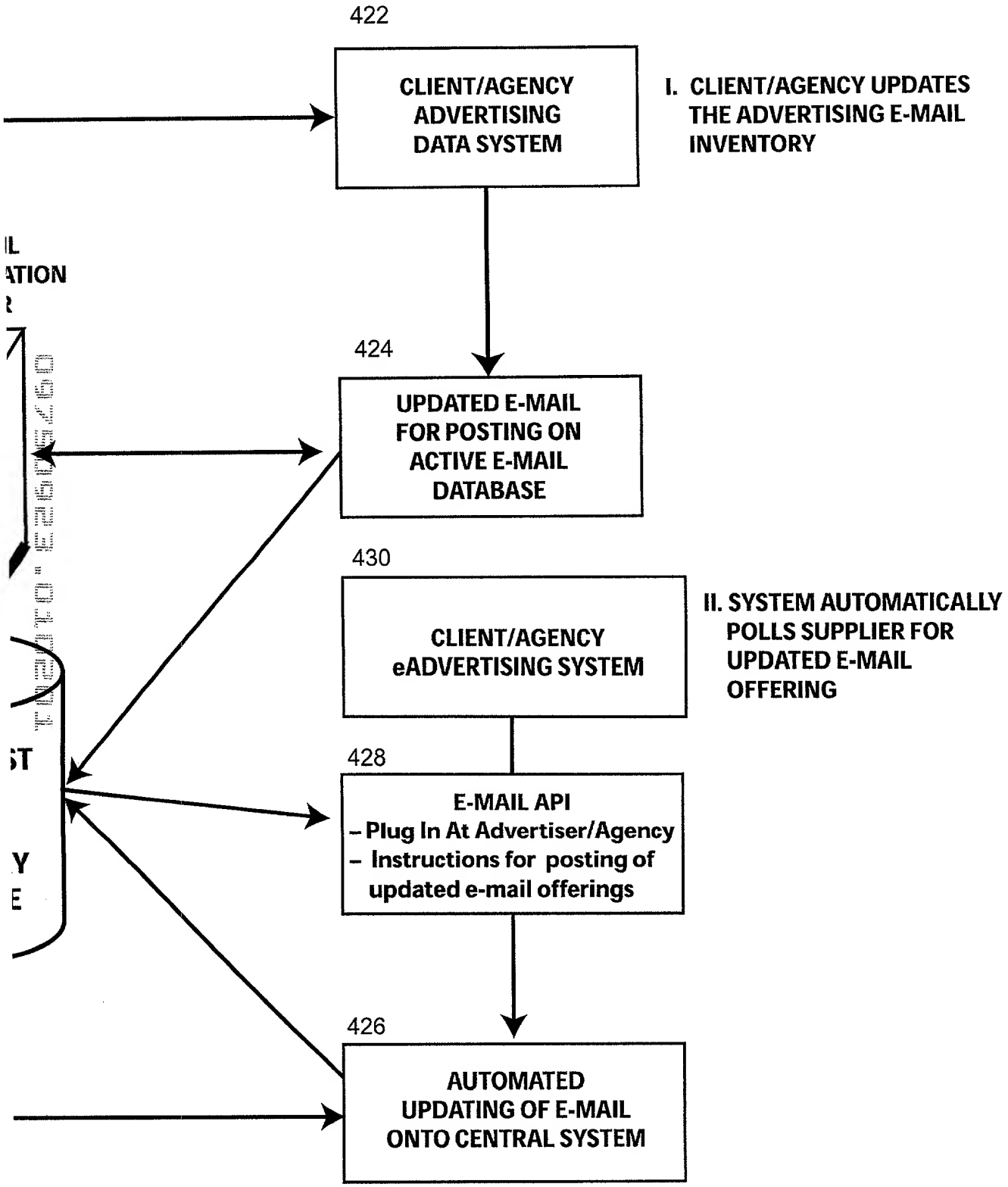

Figure 8b

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1400 **"AT MY REQUEST"—SUPPLIER ACCOUNT MANAGEMENT INTERFACE**

1402

DATE: TIME:

1404 PRIMARY ☐ Agency ☐ Client | BACKUP ☐ Agency ☐ Client

1418 Name: 1406 1408 1410 | 1412 1414 1416

1420 e-mail:

1422 Phone:

1424 Fax:

1426 Mail:

1428

1430 BILLING CONTACT 1446 1448 1450 1452 1454

1444

1432 PRIMARY ☐ Agency ☐ Client | BACKUP ☐ Agency ☐ Client

1434 Name:

1436 e-mail:

1438 Phone:

1440 Fax:

1442 Mail:

1456 Client:

1458 Brand:

1460 Product Lines:

1462

1464 Campaigns: <name> 1466 | <tracking code> 1468

1470 Master Contract:

1472 Affiliate Relationship:

1474 Current Volume Discount:

1476 Exclusivities (if any):

VIEW PRIOR EDIT | CAMPAIGN PLANNING | CLASSIFY | RESULTS

1470 1472 1474 1476

Figure 9a

© 2000 ZOECORP

1500 **"AT MY REQUEST"—SUPPLIER CAMPAIGN PLANNING INTERFACE**

1525 DATE: TIME: 1527

1502 1560

1504 **BRAND:** _____ **PERFORMANCE GOALS** 1562

1506 **PRODUCT:** _____ **Delivery:** 1564

1508 **CAMPAIGN:** _____ **# Responses:** 1566

1510 **Name:** _____ **% Response:** 1568

1512 **Execution(s):** _____

1514 **Format:** ☐ HTML ☐ Video ☐ Text Only **Cost Per Response:** 1570

1516 **Promotional Offer:**

1518 **Promotional Updating:**

1520 View e-Mail 1572

1522 1574

1524 **TIME FRAME** **TARGET DEFINITION**

1526 **Start Date:** Run of Service: 1576

1528 **End Date:** Demographic Preferences: 1578

1530 ☐ Hard Close ☐ Soft Close Purchase Intentionality 1580

1532 **Soft Close Criteria:** Targeting Hierarchy: 1582

1534 ☐ Continue to delivery goal

1536 ☐ Add to budget (see below) 1584

1538 1586

1540 **BUDGET** **OPTIMIZATION FUNCTIONS** 1588

1542 **ORIGINAL** **REVISE 1** **REVISE 2** ☐ # Responses 1590

☐ Cost per Response 1592

☐ Opti*Mark (Cross Media) 1594

1544 **BANNER AD INTEGRATION** 1596

☐ Increment budget by ___% (per contact pre-approved if Cost per Response is within allowable) Cross Support Planning 1598

1546 1501

1548 **ROTATION** ☐ HTML ☐ Video **PRODUCT CLASSIFICATION SUMMARY** 1503

1550 **IF yes, rotate executions*** **Category:** 1505

1552 ☐ To same recipient within ___ days **Sub-category:** 1507

1554 ☐ If cost per response falls __% over goal **SKU:** 1509

1556 * Execution codes for rotation **Price/Range:** 1511

Promotional Type: 1513

1558

Classification Interface 1515

Revision History | Acct. Mgt. | Classify | Results Time:

1517 1519 1521 1523

Figure 9b

© 2000 ZOECORP

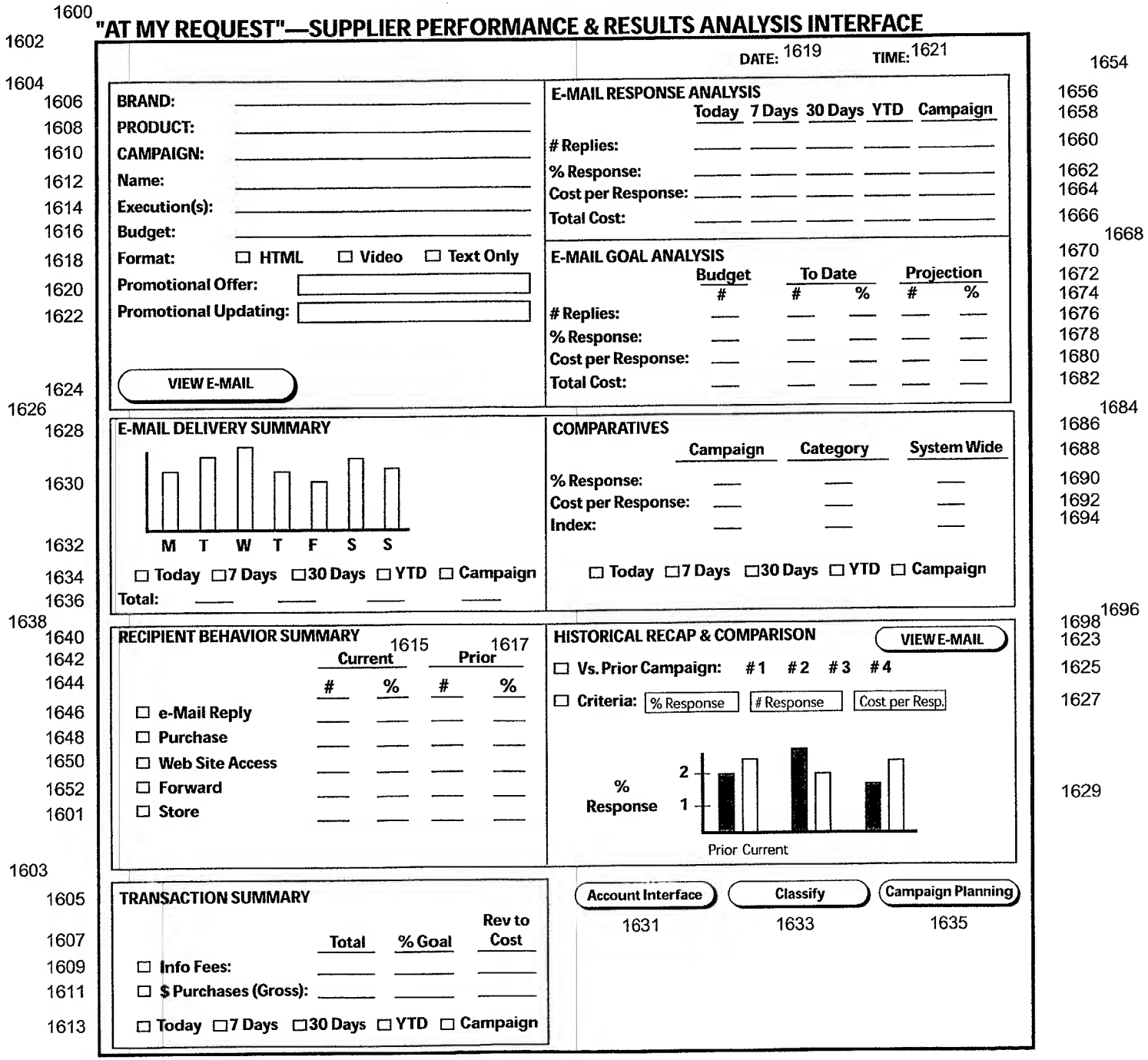

Figure 9c

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1700 "AT MY REQUEST"—E-MAIL PRODUCT/INFORMATION CLASSIFICATION INTERFACE

DATE: 1754 TIME: 1756

1702 1758

1704 BRAND: _____

1706 PRODUCT: _____

1708 CAMPAIGN: _____

1710 E-MAIL: _____

1712 [VIEW E-MAIL]

1714

Start Date: 1760

End Date: 1762

☐ Hard Close ☐ Soft Close 1764

[SEE ORIGINAL] [EDIT] 1766

1768

1716	Category:	clothing
1718	Sub-category 1:	womens
1720	Sub-category 2:	outerwear
1722	Sub-category 3:	winter
1724	Sub-category 4:	coats
1726	Sub-category 5:	synthetic fiber
1728	Sub-category 6:	filled
1730	Sub-category 7:	water-proof
1732	Sub-category 8:	hooded
1734	Sub-category 9:	petite
1736	Sub-category 10:	designer label

1770 PROMOTIONAL OFFER 1772

Promo Type:

☐ Rebate 1774 ☐ Free Premium 1784

☐ Instant Refund 1776 ☐ Self-Liquidator 1786

☐ Coupon Voucher 1778 ☐ Referral Incentive 1788

☐ Two-Fer 1780 ☐ Other: _____ 1790

☐ Free Trial 1782

Promo Start Date: 1792

Promo End Date: 1794

Incremental cost for promo: 1796

Per Use $_____ Budget $_____ 1798

Criteria for promo duration: 1701

☐ # Responses 1703

☐ Promo $ 1705

1738 1707

1740 PRICING 1709

keep posted until 1742

BANNER AD INTEGRATION

Ad: <Headline> 1711

Code: 1713

Start Date: 1715

End Date: 1717

When Run: 1719

☐ When Request is Made 1721

☐ After First e-Mail Sent 1723

☐ With Each New e-Mail Group 1725

☐ At Reply 1727

☐ Stop After Request Not Active 1729

☐ Continue After Request Not Active 1731

1744	☐ Base Price:	$_____	___/___/___
1746	☐ Special Offer to Preferred Customer	$_____	___/___/___
1748	☐ 1st Reduction	$_____	___/___/___
1750	☐ 2nd Reduction	$_____	___/___/___
1752	☐ 3rd Reduction	$_____	___/___/___

1733 [Acct. Mgt.] 1735 [Planning] 1737 [Results]

Figure 9d

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"AT MY REQUEST"—SUBSCRIBER HISTORY

(maintained by system as secure, private data)

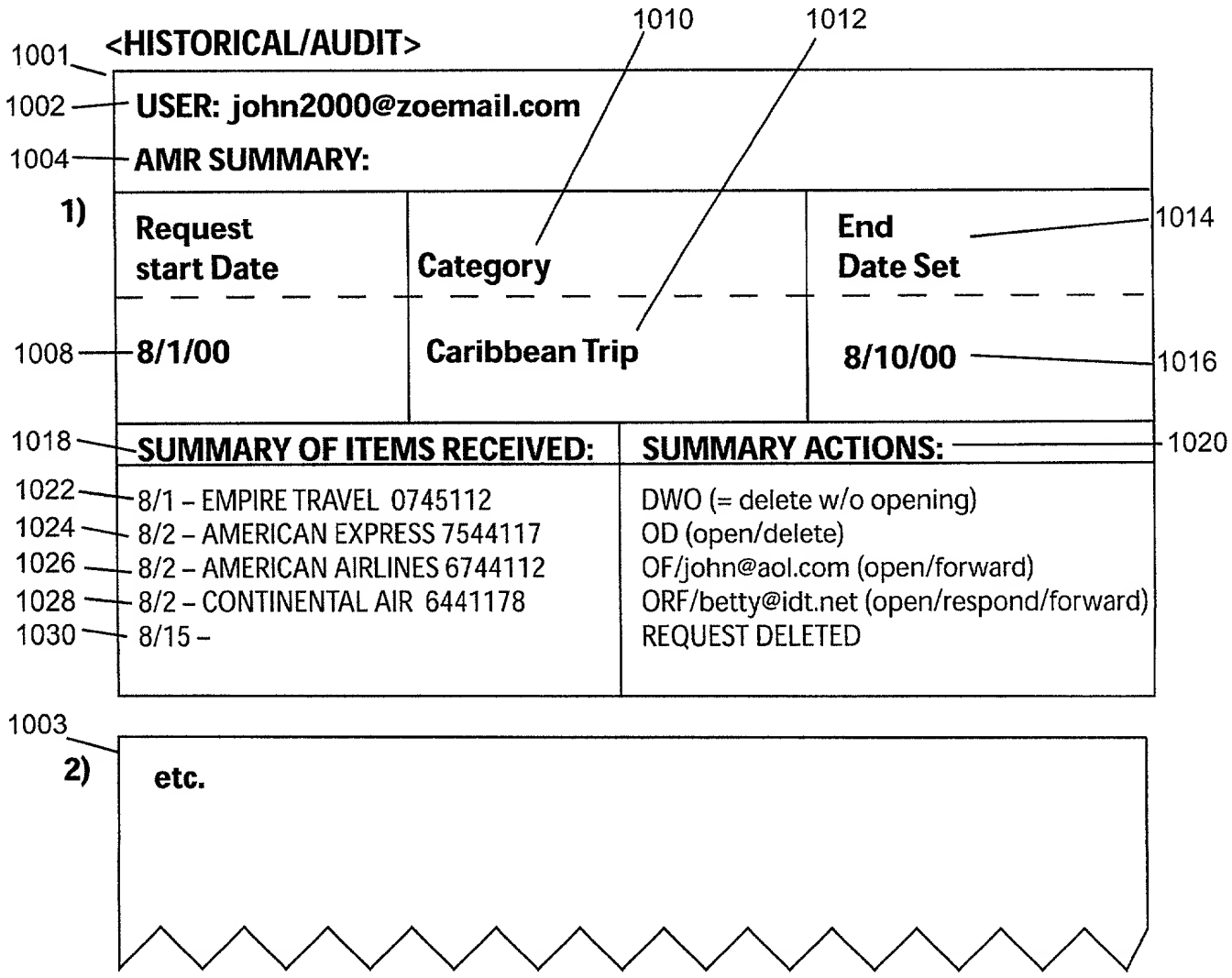

Figure 10

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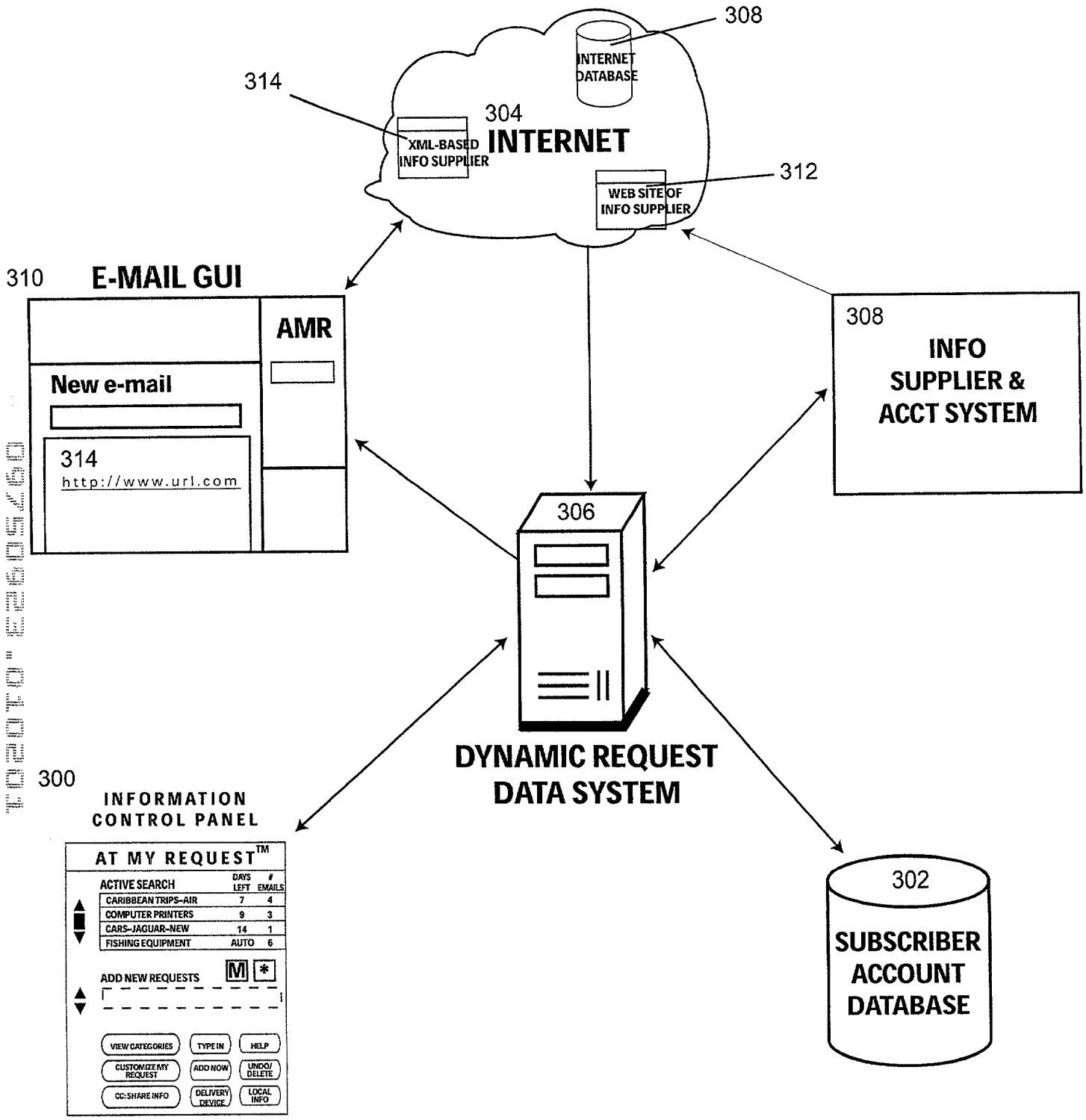
AT MY REQUEST
ALTERNATIVE EMBODIMENT
USER ACCOUNT-DRIVEN, SEARCH ENGINE-BASED REQUEST FULFILLMENT SYSTEM



This is an alternative system to the primary system of Figure 1

Figure 11

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SUBSCRIBER INFORMATION ACCOUNT HOLDER USE CASE FLOW CHART

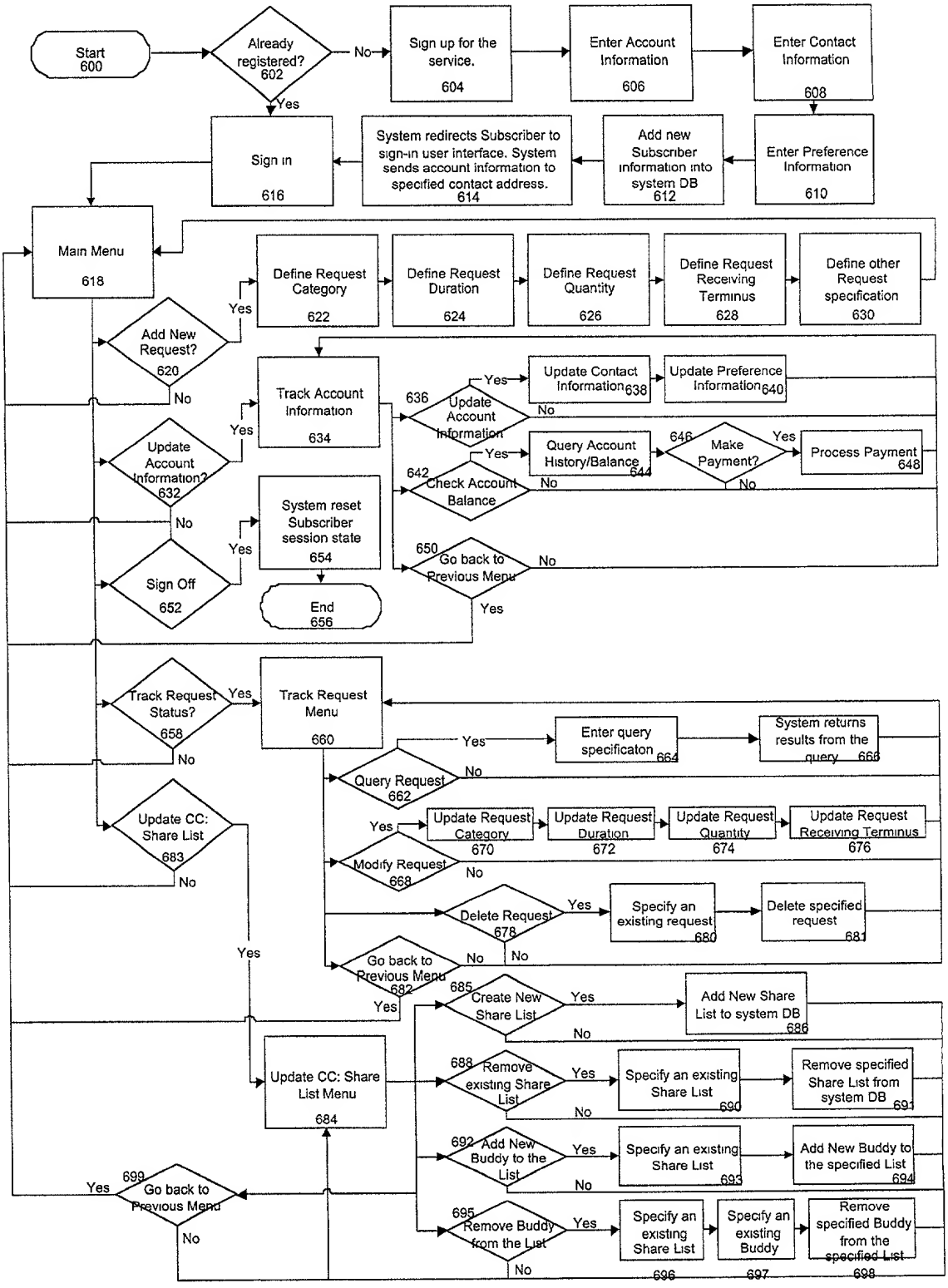

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Figure 12

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SUPPLIER INFORMATION ACCOUNT HOLDER USE CASE FLOW CHART

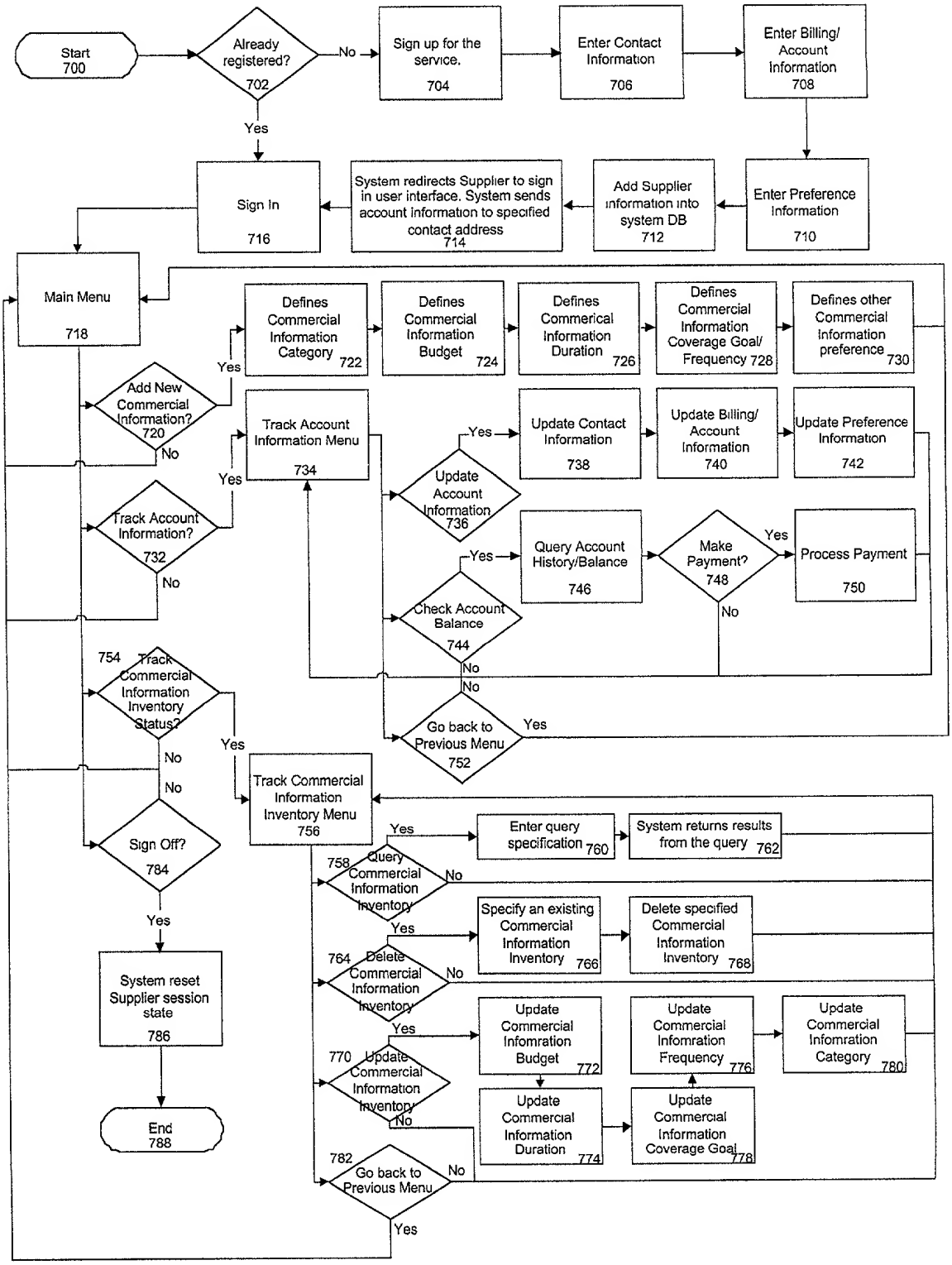

Figure 13

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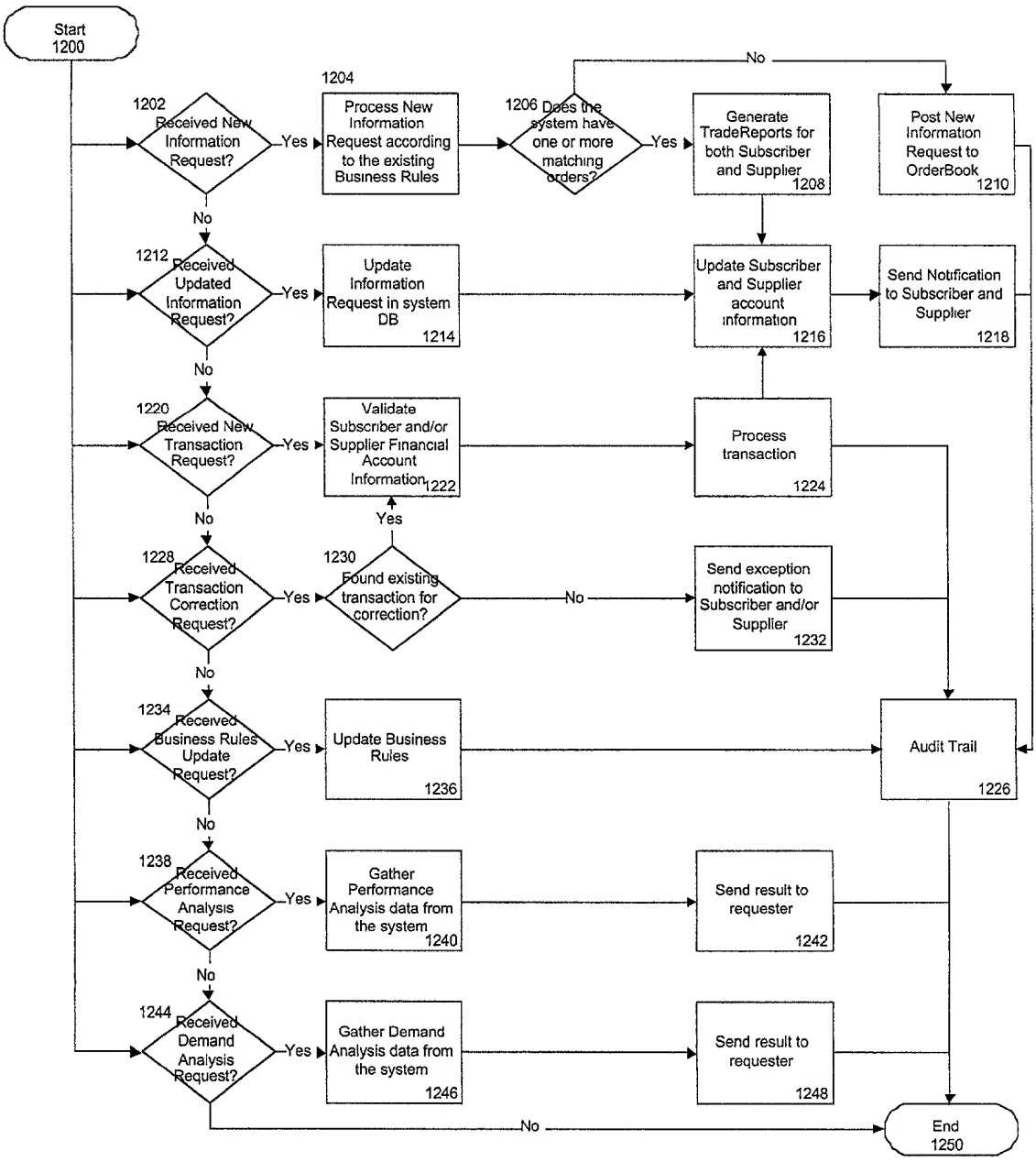
SYSTEM USE CASE FLOW CHART



Confidential

Figure 14

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